

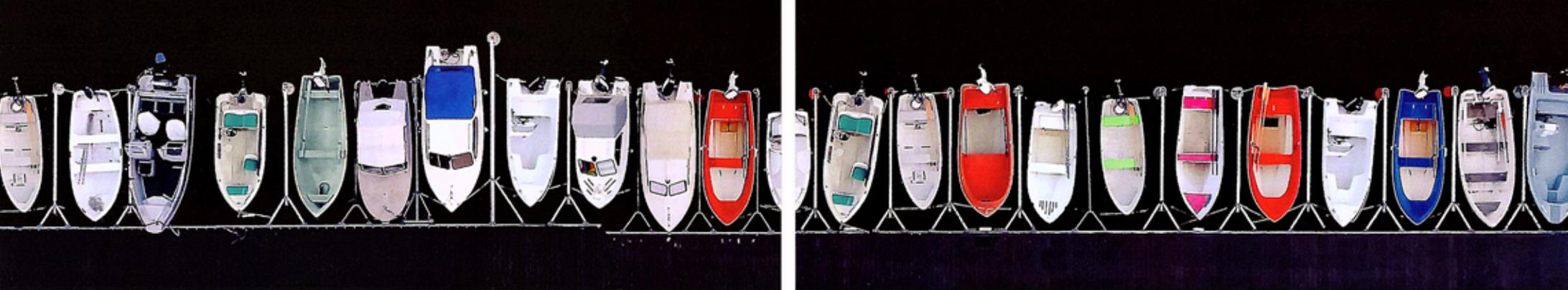
# HSBC Global Managed Portfolio Service

A cost-efficient globally diversified  
solution from a highly experienced team



**HSBC**  
Global Asset  
Management

For Professional clients only



## A world-class adviser service from a leading global asset manager

Did you know HSBC offers much more than international banking? HSBC Global Asset Management is one of the world's largest asset managers. We focus on bringing you the client service, global reach and investment expertise you need to help your clients achieve their goals.

That's what the Global Managed Portfolio Service is all about.

With HSBC Global Asset Management's deep understanding of local markets and broad investment knowledge – our Global Managed Portfolio Service is designed to give your clients access to a range of cost-efficient, truly diverse global portfolios.

## You focus on building your client business

## We focus on managing your clients' investments

We believe that consistent performance comes from combining a range of investment opportunities worldwide. Finding these opportunities – at the right price – takes resources and expertise.

The HSBC Global Managed Portfolio Service is designed to give your clients the diversification they need, the performance they demand, at a cost they can appreciate.

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### Contact us for queries or further information by:



Emailing the client services team  
[wholesale.clientservices@hsbc.com](mailto:wholesale.clientservices@hsbc.com)



Visiting our website  
[www.assetmanagement.hsbc.co.uk/en/intermediary/investment-expertise/multi-asset/global-mps](http://www.assetmanagement.hsbc.co.uk/en/intermediary/investment-expertise/multi-asset/global-mps)



Or talk to your relationship manager

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## Globally diversified managed portfolios for your clients

### Delivering opportunities to help grow your business

Offering 'global reach' is one thing, but what does that really mean for financial advisers in the UK? When you work with HSBC, it means investment experts based locally – in key locations throughout the world – so nothing gets lost in translation.

Local expertise makes it easier for us to discover potential opportunities. It also means there are fewer constraints in bringing you and your clients quality ideas. Plus, our considerable resources give us the buying power to deliver these opportunities more cost-effectively.

Your clients can choose from one of five globally diversified managed portfolios – each intended for a different risk profile. And since you don't need to worry about managing portfolios or rebalancing asset allocation, you can focus your attention on your clients and attracting new business.

We know you value your freedom – to offer your clients the best service, grow your business and take advantage of opportunities when they arise. The HSBC Global Managed Portfolio Service is designed specifically to help you to do just that.

Over 75 investment professionals focusing on multi-asset portfolios across five key locations: London, Paris, Düsseldorf, Hong Kong and Vancouver

Source: HSBC Global Asset Management as of 31 March 2019.



**Transparency on charges and fees**  
You and your clients see clearly what you pay with complete transparency of underlying holdings, cost and performance. We also believe total costs are what matter. That's why we use our in-house funds – because they not only give you extra visibility, but also don't carry an additional management charge.



**An experienced multi-asset team focused on performance**  
The group of specialists behind the Global Managed Portfolio Service is part of the same multi-asset team who manages our Global Strategy and World Selection funds. The Global Strategy Balanced Portfolio has delivered an annualised return of around 7.43% (net of fees) over the past five years\*.



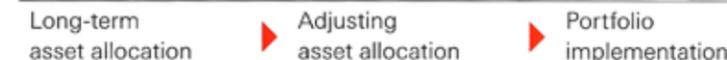
**Experience and tools to help you expertly manage risk**  
Risk comes in many forms and from places you might not expect. As a global asset manager with over 40 years of experience, we can spot and deal with potential hazards quickly. That's because our extensive in-house capabilities allow us to model and evaluate risk based on expert analysis using a wide range of data.



**Solutions to meet different risk profiles**  
Five managed portfolios cover a range of risk tolerances: from cautious to adventurous. Each uses a mix of different types of investments across many regions and countries and are actively rebalanced by our multi-asset team. Although they can be complex, our globally diversified portfolios are also built in a way that makes them easy for you and your clients to understand. Our portfolios are rated by external risk rating agencies.



**Consistent, proven institutional processes**  
Our processes are driven by our core investment view: that clear investment beliefs and a well-executed process are critical to delivering long-term value. Our global asset management team uses this philosophy along with expertise and tools to allocate and actively rebalance funds – creating portfolios that are consistent with all our institutional multi-asset solutions.



Past performance is not an indication of future returns.  
\*HSBC Global Asset Management as at end of March 2019.



**Lower costs mean higher potential returns**  
Our global reach gives us economies of scale that help drive down costs, which we pass on to you. And because we tend to use HSBC funds, there is no management charge for these underlying funds. The result: complete transparency of total charges, and one of the lowest cost actively managed portfolio solutions on the market.



**More than a service, a partnership**  
Few organisations have the global reach and local service to offer the broad client support we do. Our sales teams are backed by over 20 regional discretionary investment specialists who understand the strategy behind our portfolios. Their insights are combined with additional expertise from more than 75 multi-asset professionals located in key markets around the world. Support ranges from market and strategy updates, to sales and investment documents, to attendance at your in-house investment forums and more.

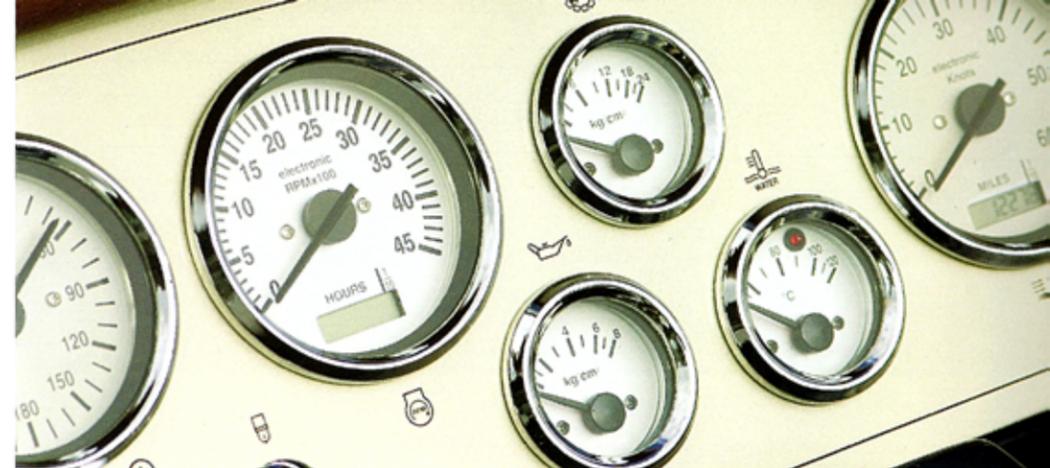


**Experience and understanding of UK IFA market**  
We have been working with advisers in the UK since 1985. This has helped us build lasting relationships with IFAs and gain a better appreciation of your concerns and needs. This knowledge – coupled with specific research we conducted to create our global managed portfolios – has helped us shape a product and service that meets the varying demands of today's business owners and their clients.



**Our client is you – your clients remain your clients**  
Your clients trust you to guide them, and that's the way it should stay. Our dealings are with you, and you alone.

- Why choose the HSBC Global Managed Portfolio Service?**  
Quick look: a choice of 5 easy-to-understand risk-rated portfolios
- ◆ One of the lowest cost actively-managed model portfolio services on the market
  - ◆ Globally diversified to balance fluctuating asset prices
  - ◆ Transparent charges, fees and underlying holdings
  - ◆ Performance-driven by a highly experienced team
  - ◆ Proven institutional investment processes from a world-leading asset manager
  - ◆ Service-driven with access to regional specialists, as well as comprehensive insights and materials



## Why a globally diversified portfolio matters

Your clients may ask you why they should diversify globally at all. Because it can make a difference to their returns as well as the consistency of those returns.

The performance of different assets varies from one year to the next. What may be the top performing investment one year can take a downturn the next. It's difficult to predict. But a globally diversified portfolio adapts to these changes – and can provide better overall returns.

A global mix of assets can also help investors reduce the effects of what economists call "home country bias," which is the tendency to invest primarily in companies and locations they know. This approach usually means missing out on meaningful growth opportunities in other – less familiar – parts of the world.

## Key risks

The value of an investment in the portfolios and any income from them can go down as well as up and as with any investment you may not receive back the amount originally invested

- ◆ **Equity risk:** market fluctuations can affect the performance of an investment fund both upwards and downwards. You may not get back the full amount invested
- ◆ **Emerging markets risk:** emerging economies typically exhibit higher levels of investment risk. Markets are not always well regulated or efficient and investments can be affected by reduced liquidity
- ◆ **Exchange rate risk:** investing in assets denominated in a currency other than that of your own currency perspective exposes the value of the investment to exchange rate fluctuations
- ◆ **Fixed income risk:** as interest rates rise debt securities will fall in value. Issuers of debt securities may fail to meet their regular interest and/or capital repayment obligations. All credit instruments therefore have potential for default. Higher yielding securities are more likely to default
- ◆ **Real estate risk:** cost of acquisition and disposal, taxation, planning, legal, compliance and other factors can materially impact real estate valuation

### For Professional Clients only.

**This document should not be distributed to, or relied upon by Retail Clients.**

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Stock market investments should be viewed as a medium to long term investment and should be held for at least five years. Any performance information shown refers to the past and should not be seen as an indication of future returns.

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